

Using Purview Advanced Features

Tuesday 10/30/2007

Breakout Session 5C

Wednesday 10/31/2007

Breakout Session 3C

Using Purview Advanced Features

- Audience

Anyone who wants to tap into some of the more advanced features in DAMIR 3.0

Using Purview Advanced Features

Topics

- Portal Recent Programs
- User Preferences
- Purview Program Selection Advanced View
- Purview Program Detail Customization
- Purview PDF Report
- Search
- Reports
- Earned Value

Using Purview Advanced Features

Portal Recent Programs

- Ribbon Below the Main Navigation Area
- Most Recent
 - Maximum of 10 programs
 - Most recent is left-most
- Scroll
- Links available depend upon privileges, go directly to that area
 - “Purview” – Link below graphic and graphic itself
 - “Edit SAR”
 - “Edit APB”

Using Purview Advanced Features

User Preferences

- RSS Feeds
 - Two sections on right sidebar of Portal page
- Notification Email
 - Left sidebar of Portal page always available
 - Select email frequency
 - Daily Digest
 - Individual messages
 - None
- Default Grid Settings
 - Number of rows
- Set Preferences
 - Click on “Administration - Update My Information”
 - Click on “Edit Preferences”

Using Purview Advanced Features

Purview Program Selection Advanced View

- Anytime you have a Program List View
 - Purview
 - Create or Edit a <document>
- “Advanced View” link
- Table layout
- Choice of Columns
- Filters
 - Program Type
 - Active Status
- Table Controls
 - Sorting
 - Clear Sort
 - Paging
 - Number of Rows (note default restored when return to the page)

Using Purview Advanced Features

Purview Program Detail Customization

- Most useful feature
- Organize the page and it is presented that way next time you open Purview
 - Show/Hide Panels
 - Click on header bar “Hide” or “Show” link
 - Choose Panels or Reorder
 - Click on “Customize This Page”
 - Add panels, click on checkbox then click on “Add”
 - Remove panels, click on “Close” for that panel
 - Order panels by drag and drop, click on header bar for panel
 - “Reset to Defaults” restores page to system default
 - Click on “Done” to finish modifications
 - As features added to the product, panel list will be updated

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Purview PDF Report

- Select the submission or effective date
- Click on “PDF Report”
 - Contains all relevant views for selection
 - All reporting subprograms
 - Report built from database data

Search

- Enter a word or phrase
- Click on “Search”
- List of program matches
 - Program Name
 - Mission & Description

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Reports

- Requested queries across programs
- Groups of related reports
 - Submissions
 - Program Funding
 - Administration
 - Etc.
- Parameterized
 - Enter limiting factors at the top of the report view
- Output
 - PDF
 - Excel
 - Other formats, to allow importing data into other system
- Requests for new reports
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Earned Value

- Located in Purview
 - Click on “Earned Value”
- Select a Contract
- Tabular Data Displays
 - Forecast
 - Summary
 - Cumulative
 - Current
- Charts
 - Variance
 - Performance
 - Series Controls
 - Key

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Questions?